

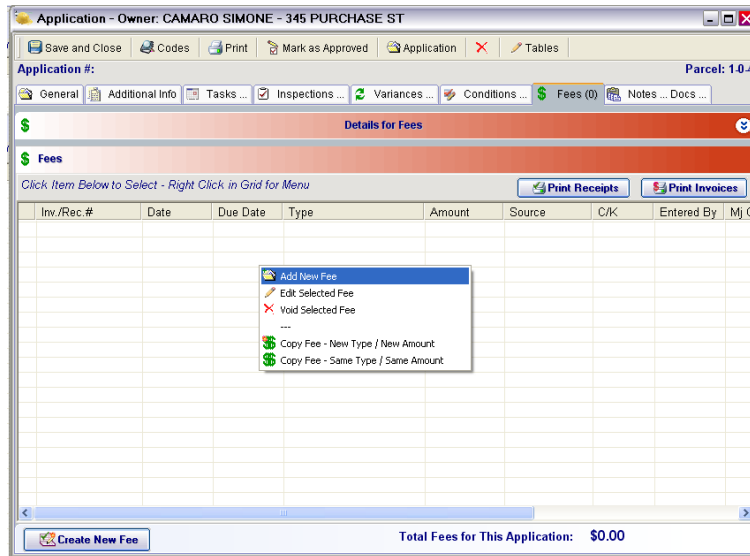
Creating and Collecting Fees

In Municipity, there are two ways for fees to be created, depending on how your system is set up.

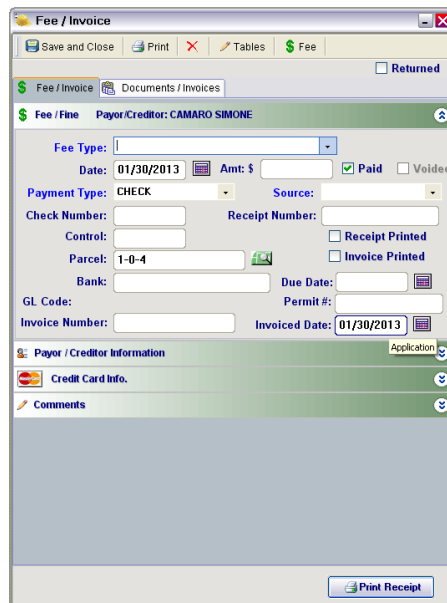
If the system is set up to automatically generate fees, you will be prompted to collect the fees as soon as you click on the Fees tab in an application.

If you need to add fees manually, however, there are a few more steps involved.

First, open the Fees tab in the application where you need to collect the fees. Right click in the white space on the screen and choose "Add New Fee" from the menu that appears.



This will open a blank fee.



First, you will need to choose the fee type. Once that is chosen, enter the amount. For some fees, this will bring up a calculation window that will ask for a value that the fee calculation is based on, such as fixtures.

Fee Calculator

Save and Close

Fee Code: PLUMBING - RES: NEW UNIT RENOVATIONS

Description:

Complex Calculation:

Fixtures

Calculate Fee: \$ 0.00

Once you enter a value and click “Calculate,” the fee will be updated to the correct amount, based on the calculation done by Municipity. To enter this amount into the fee, hit the “Save and Close” button. This will enter the amount into the “Amt” field on the fee form.

Fee / Invoice

Save and Close Print Tables Fee

Returned

Fee / Invoice Documents / Invoices

Fee / Fine Payor/Creditor: CAMARO SIMONE

Fee Type: PLUMBING - RES: NEW UNIT RENOVATI

Date: 01/30/2013 Amt: \$ 150.00 Paid Voided

Payment Type: CHECK Source:

Check Number: Receipt Number: 13-1129

Control: Receipt Printed

Parcel: 1-0-4 Invoice Printed

Bank: Due Date:

GL Code: 01 / 243.4450 - Plumbing/Gas Permit #:

Invoice Number: Invoiced Application 01/30/2013

Payor / Creditor Information

Credit Card Info.

Comments

Print Receipt

From here, you can enter more information, such as the payment type, like cash, check, money order, etc. You can also enter the check number, comments, and payer information.

If the fee is being paid by a contractor, you can find their information in the Companies and Contacts list if they are a saved contact. First, expand the “Payer/Creditor Information” tab by clicking on the double arrow icon.

The screenshot shows the 'Fee / Invoice' window with the 'Payor / Creditor Information' section expanded. The window title is 'Fee / Invoice' and it has a menu bar with 'Save and Close', 'Print', 'Tables', and 'Fee'. Below the menu bar is a 'Returned' checkbox. The main content area is divided into sections: 'Fee / Invoice' (with 'Documents / Invoices' sub-section), 'Fee / Fine' (with 'Payor / Creditor: CAMARO SIMONE'), and 'Payor / Creditor Information'. The 'Payor / Creditor Information' section is expanded, showing fields for Name (CAMARO SIMONE), Address (345 PURCHASE ST), City (MILFORD), State (MA), Zip (01757), Hm. Phone, Fax, Wk. Phone, Pager, Cell, e-mail, and website. There are also fields for Fee Type (PLUMBING - RES: NEW UNIT RENOVATI...), Date (01/30/2013), Amt (\$ 150.00), Payment Type (CHECK), Source, Check Number, Receipt Number (13-1129), Control, Parcel (1-0-4), Bank, Due Date (Application), GL Code (01 / 243.4450 - Plumbing/Gas), Permit #, Invoice Number, and Invoiced Date (01/30/2013). A 'Print Receipt' button is at the bottom right.

To search for a saved contact, click on the button next to the Name field in this section.

This is a close-up of the 'Name' field in the 'Payor / Creditor Information' section. The text 'Name: CAMARO SIMONE' is displayed in a text box. To the right of the text box are two icons: a magnifying glass (search) and a document with a plus sign (add/edit).

This will open the Companies and Contacts search window.

The screenshot shows the 'Companies / Contacts' search window. It has a menu bar with 'Save and Close', 'Search', 'Tables', and 'Add New Company / Contact'. Below the menu bar is a 'Search / Filter' section with a search box and a dropdown arrow. The search criteria include 'Name', 'License/Policy #', 'Company Type', and 'Contact Type'. There is a checkbox for 'Don't Show Inactive Companies / Contacts' and buttons for 'Search w/ Filter' and 'Clear Filter'. Below the search criteria is an alphabetical index (A-Z) and a list of companies. The list includes: 6-J Construction - 508-278-6267, A Custom Co. - 508-962-8951, Robert Scobie - 508-962-6951 (M), A J Plumbing Heating Inc. / Chaffins Plumbing - 508-829-4466, George Miaglionico - License #: 'M9372 - 508-829-4466 (M), A L A Remodeling & Building Corp. - 508-328-8598, Anthony L. Riccero, A&B Electrician - 508-478-0351, Michael O'Connell - License #: 'E33958 - 508-478-0351 (M) - 508-759-1077 (A), A. Spolidoro And Sons, Inc. - 978-667-3955, A.B.K. Plumbing & Heating - 508-595-9212, Bryan Goodall - License #: 'M12916 - 508-696-9212 (M), A.S. Jones & Co. Inc. - 508-634-1800, Albert Jones - License #: 'E15648 - 508-634-1800 (M), Aalance Service Corp. - 508-386-1196, Donald Baker - License #: 'M12848 - 508-254-6198 (M), Accelerate Energy, Josh Leet, Adam Curetop - 774-266-3284, and Adam Curetop. A note at the bottom states: 'Note: for speed the above list is limited to 200 companies/contacts'.

Enter the company's name in the "Name" field and hit the "Search w/ Filter" button to search for a matching contact. When you have your results, double click on the appropriate name, and it will automatically fill in the information in the Payer/Creditor section with the company's information.

Payor / Creditor Information

Name: A J Plumbing Heating Inc. / Chaffins Plumbing

Address: 672 Main Street

City: Holden **State:** MA **Zip:**

Hm. Phone: **Fax:**

Wk. Phone: 508-829-4466 **Pager:**

Cell: **e-mail:**

website:

Once the information is filled out to your satisfaction, you can either save and close the fee, or print it from the Print Receipt button at the bottom of the window. If you need to print a receipt for multiple fees at one time, you will want to close the fee and use the Print Receipts button in the Fees tab to print all of them together.

Application - Owner: CAMARO SIMONE - 345 PURCHASE ST

Parcel: 1-0-4

Details for Fees

Fees

Click Item Below to Select - Right Click in Grid for Menu

Print Receipts **Print Invoices**

Inv./Rec.#	Date	Due Date	Type	Amount	Source	C/K	Entered By	Mj G
13-1129	1/30/2013		PLUMBING - RES. NE...	\$ 150.00		CHECK	SUPERV...	01
13-1130	1/30/2013		Blid - COMMERCIAL- L...	\$ 700.00		CHECK	SUPERV...	01

Create New Fee **Total Fees for This Application: \$850.00**